






ePROCUREMENT 8.8

PO ITEM CATEGORY CHANGE

A PO line's Item Category can be directly changed before a PO is Approved/Dispatched. After that time, the Item Category is grayed-out and cannot be directly changed. What must be done is to move amounts that are not invoiced from the existing PO line to a new PO line and enter the desired Item Category on the new PO line.

This topic will show you how to move unused amounts to the desired Item Category on a PO line.







Go to the PO Activity Summary to see which lines have been invoiced and whether Case 1 or 2 below applies. Use the following steps to change Item Categories for existing PO lines:

- Begin by 1) canceling **OR** 2) reducing the existing PO lines to what was spent-- depending on the case below:
 1. For Case 1 (there are no invoices on the PO line) cancel the old line as follows:
 - Click **Schedule** , **Distributions** , **Req Detail**  tab, and the pink eraser . (Note the Requisition Number)
 - Return to the main PO page.
 - Click the **Statuses** tab then click the red **X** to cancel the line
 2. For Case 2 (the line has been invoiced) reduce the old line as follows:
 - Change the line from its existing quantity to **0** then click the Refresh  **Refresh** button at the bottom. (This assumes the dollars are in the quantity and the price is \$1.)
 - A dialog box will pop open that says, "Schedule is partially matched with quantity 41846.25. Cannot reduce quantity lower than quantity matched." Jot down the amount invoiced.
 - Enter the amount invoiced into the PO line's quantity box.
- Click **Yes** to Create a Change Order
- Click **Yes** to "Increase requisition open quantity for Req 0000827553 line 1." This will send the unused requisition quantities back to be sourced again (send it back to the requisition pool).
- **Save** the PO (but don't Approve it yet). This will send the quantities back to the requisition pool.

- Click the **Copy From Requisition** drop down (in the top of the PO Header) and add the requisition line(s) back onto the PO. (The requisition number also appears in the Requisition link on the PO Header.)





Maintain Purchase Order

Purchase Order

Unit: LBNL	PO Status: Dispatched  
PO ID: 6811836	Budget Status: Valid  
Change Order: 6	<input type="checkbox"/> Hold From Further Processing
Copy From: <div>▼</div>	
▼ Header	
Requisition	
*PO Date: 10/03/2006 	Vendor Search
Vendor: ELECTRIC POWER	Vendor Details
*Vendor ID: 0000014199	ELECTRIC POWER GROUP
*Buyer: SWALKERL 	Walker-Lam, Sue
PO Reference: <input type="text"/>	
Header Details	PO Activities
PO Defaults	Document Status
Edit Comments	Requisitions
Add Ship To Comments	Mod Table Details
Backorder Status: None	Create BackOrder
Receipt Status: Not Recvd	
*Dispatch Method: Phone	Dispatch
Amount Summary	
Merchandise: 2866340.00	
Freight/Tax/Misc.: 0.00	Calculate
Total Amount: 2866340.00 USD	

Add Items From

Select Lines To Display

Line	Item	Description	PO Qty	*UOM	Category	Price	Amount	Status				
1		New subcontract with Electric Power Group pertaining to Research and Monitoring of Reliability and Operations Issue For Integration of Renewable Resource. (TASK A). PI: Joe Eto, Project ID E541A1	280000.0000	EA	RANDD	1.00000	280000.00	Active				

- Change the new PO lines to the desired Item Categories.
- Approve/Save** the PO.